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RECORDS MANAGEMENT PROGRAM
Logistics Office
MISSION

To carry out all phases of a Records Management Program as established by Agency Regulations, through effective planning, directing, installing, controlling and supervising methods of records creation, records maintenance, and records disposition.

Manhours Involved

| | <u>Manhours per Week</u> <u>on Continuing Basis</u> | |
|--|--|---|
| <u>Vital Material</u> | 6 | |
| <u>Records Surveys</u> | 8 | 960 manhours initially |
| <u>Records Creation</u> | | |
| Correspondence Procedures | 4 | 40 manhours initially |
| Forms Control | 12 | 80 manhours training |
| Reports Control | 12 | 40 manhours initially 30 manhours training |
| <u>Records Maintenance</u> | | |
| Processing Correspondence | 40 | |
| Top Secret | 22 | |
| <input type="checkbox"/> | 10 | |
| Cables | 12 | |
| Filing | 16 | |
| <u>Records Retirement and Disposal</u> | 8 | 40 manhours initially |
| | 150 | 1240 |

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VITAL MATERIAL

Definition

Vital Materials are those specific items in the possession of CIA which are essential to the Agency on a continuing basis and which, in the event of destruction, would constitute a serious or irreplaceable loss.

Work Program

To obtain from each operating Division or Staff Chief within the Logistics Office a schedule of material considered to be vital to his operations or functions.

To publish an overall Logistics Office schedule of Vital Material as a guide to personnel that provisions should be made for depositing such material and to issue procedures for processing. Where possible to do so, additional copies of documents considered vital should be made and forwarded currently to the Area Records Officer for deposit. Where additional copies are not practical, the intent is to establish an automatic follow-up by the Area Records Officer to arrange micro-filming and deposit of the films.

To execute proper deposit forms, forward all material received to the CIA Vital Material Officer, and maintain centrally in the Administrative Staff receipts and records of all deposits.

To review periodic machine record inventories received from the Repository and request withdrawal of obsolete or replaced material and to make trips to the Repository as necessary to become familiar with the operations of the system and with Logistics Office material on deposit there.

To actively assist the Divisions in scheduling or preparing material for deposit, and to maintain working liaison with the CIA Vital Records Officer and Records Management Officers within other components of the Agency to ensure that adequate material effecting this Office is deposited by other components -- Examples: Tables of Organization and Basic Personnel Records - Budget Records.

Justification

Such a program is required by CIA Regulation [] and is essential to continuing operation of the Office in case of disaster. Overall supervision must be centrally assigned in order to avoid duplication of deposits within our Office or with other components of the Agency.

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Manhours Required

It is estimated that six manhours per week will be required in developing this program from an inactive stage, and that upon development, it will require at least the same amount of time in processing the documents and follow-up work.

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RECORDS SURVEYS

Definition

Study and analysis of current and non-current records, both Headquarters and Field, with a view to management planning, improvement in service and techniques, and to provide for systematic retirement and disposal of records

Work Program

To conduct an initial physical survey of all Logistics Office records to cover: location, type of records and general description, method of filing, dates, types of filing equipment used, space occupied, and other pertinent data. Such surveys are to include field installations for which Logistics Office bears responsibility. Periodic inspection should be made from Headquarters and an individual appointed in the field to carry out established procedures.

To prepare work sheet forms for all such surveys made and to file centrally in the Administrative Staff. Such records will serve as inventories and will be available for any required reports or analyses pertaining to records, filing equipment, space occupied, or management surveys.

To make annual reviews of the records of such surveys, physically recheck and bring up to date, and supplement the information obtained in the initial survey.

To conduct spot surveys as found necessary to fulfill the obligation to retire and dispose of records as required by Public Law, or in connection with establishment or elimination of forms and records.

Justification

Records Surveys are a requirement of CIA Regulation and constitute the basis for all other phases of Records Management, particularly the orderly retirement of records and establishment of Disposal Schedules as required by Public Law. Such surveys and resulting inventories have many uses from a management point of view.

Manhours Required

It is estimated that 960 manhours, or approximately six months will be required to make initial surveys. Such surveys naturally can be made only with the cooperation of and at the convenience of the operating elements. After the initial surveys, eight manhours per week should suffice for reviews and annual surveys; additions and changes to inventories; and required spot surveys to meet current needs.

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RECORDS CREATION

Definition

Review and control of the creation or proposed creation of records in the forms of correspondence, large groups of records, reports, or printed forms.

Work Program

a. Correspondence Procedures

Initiate Logistics Office Notices and Instructions designed to keep personnel currently informed of accepted Agency format for correspondence, number of copies required, signatures required, and method of processing correspondence within the Office.

Continuously spot check to insure that proper format, spelling and grammatical standards are maintained, unnecessary copies of correspondence are not being created, and proper point of record is established.

To offer advice and assistance to clerical personnel at all times regarding matters of correspondence procedure and to assist in any training programs established for the clerical indoctrination of Logistics Office personnel.

b. Forms Control

In collaboration with the Logistics Office Methods Examiner to:

- i. Participate in proposed Agency training in forms management and act as contact with the Agency Forms Management Officer.
- ii. Assemble lists and specimens of all forms used within the Logistics Office.
- iii. Issue notice to all personnel that requests for new or revised forms must be made through the Administrative Staff to the Agency Forms Control Officer, and to prepare consequent instructions regarding Forms Control.
- iv. Screen all requests for new forms for: duplication of existing forms, standardization as to size, binding or punching, etc.; tie in with existing or planned systems; number of copies to be created; method of filing to be used; and retirement and disposal dates.
- v. Maintain adequate records of forms requested and approved for use in Logistics Office.

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c. Reports Control

In collaboration with the Logistics Office Methods Examiner to:

- i. Participate in anticipated Agency training in Reports Management and Control.
- ii. Inventory all recurring reports prepared within the Logistics Office.
- iii. Review such inventory for duplication of information, proper distribution to insure full utilization, possibility of consolidating reports, and eliminating unnecessary copies.
- iv. Install a system of Reports Control, whereby all requests for submission of recurring reports would clear through the Administrative Staff; would be considered in the light of existing reports; would be coordinated with the operating element; would be approved by the proper authority; and the most desirable format, distribution and point of record established.
- v. Prepare necessary instructions regarding ^{Reports} Forms Control, proper format, reporting dates, etc.

Justification

Such review of records creation is an integral part of any Records Management Program.

The need for correspondence procedures is a continuing one and necessary to maintain acceptable standards.

The Agency proposes to decentralize forms control as applying to forms designed for and used by a particular office and it will be the responsibility of the office to control the need for and proper design and use of such forms.

Good! || The need for "Reports Control" is apparent, in that, at present, requirements for reports are placed on the operational element from within or outside the Logistics Office without regard to existing reports or availability of the required information in other forms of material.

Manhours Required

a.. Correspondence Procedures

Four (4) manhours weekly.

b. Forms Control

Estimated 40 manhours to inventory and set up required records.

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Estimated 80 manhours for training. (Records Management Officer and Methods Examiner.)

Estimated 12 manhours per week on a continuing basis.

c. Reports Control

Estimated 80 manhours for training. (Records Management Officer and Methods Examiner.)

Estimated 40 hours initially in setting up system and records.

Estimated 12 manhours per week on a continuing basis.

RECORDS MAINTENANCE

Definition

The receipt, recording, controlling, processing, and filing of all office records.

Work Program

a. Processing Correspondence

To establish systems and continue operations for the efficient and expeditious handling of incoming and outgoing correspondence through the use of a "Mail Control Ticket". This system to act as a record of classified documents in compliance with Security Regulations; a control as to where a document may be located at any particular time, and a suspense follow-up of material requiring reply.

b. Top Secret and Registered Documents

To receive, process, control, and maintain Top Secret and Registered documents in accordance with Security Regulations and Logistics Office Instructions.

To train and advise new employees and to issue Logistics Office Notices and Instructions as necessary to insure proper handling of Top Secret and Registered material.

To furnish Central Top Secret Control records of all receipts and dispatches as required, and act as liaison in all requests to them. To review and declassify or destroy Top Secret material as advisable.

c. ☐

To revise procedures and Instructions as necessary.

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d. Cables

To receive, record, and distribute all cables assigned to Logistics Office. To ascertain if referenced cables are in Logistics Office, and if not, request immediately from Signal Center. To act as liaison in all requests for amended distribution.

To periodically review and revise as necessary the requirements of Logistics Office to Signal Center, coordinating same with the DD/A and the DD/P.

To review the present system of distribution, follow-up and filing of cables within the Office.

e. Filing

To install, and revise as necessary, topical system of filing as recommended by the Agency for all general and administrative files in Logistics Office.

To centralize filing for the Office of the Chief and provide cross index and reference service insofar as possible.

To review filing systems in the Divisions in conjunction with records surveys and make recommendations and assist in improving filing procedures.

To review requests for new or additional filing equipment to ensure that most suitable and economical equipment is used.

Justification

Such services are essential to efficient operation; required in the interests of security, and must necessarily be centralized to avoid work duplication.

Manhours required

a. Processing Correspondence

40 manhours per week on a continuing basis.

b. Top Secret

22 manhours per week on a continuing basis.

c. ☐

10 hours per week on a continuing basis.

d. Cables

12 hours per week on a continuing basis.

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e. Filing

16 hours per week on a continuing basis.

RECORDS DISPOSAL

Definition

The orderly and systematic retiring of non-current records, both Headquarters and Field, to a secure records area, and the subsequent disposal of records as authorized under a disposal schedule approved by National Archives.

Work Program

To apply present approved Retirement and Disposal schedule to Office records and to establish cross-reference and follow-up system to ensure retirement and disposal in accordance with authorized schedules.

After conducting records surveys, to prepare requests to the National Archives, through General Services Office, for authorized disposal dates for records, Headquarters and Field, not included in present schedule.

To approve all "Records Retirement Request" forms; arrange for acceptance and transmittal of the records, which are prepared for storage by the operating element, and maintain records and locations of all files stored or disposed of.

To offer advice and assistance as required on matters pertaining to the disposition of records and to issue any necessary instructions or procedures.

Justification

This phase of Records Management is mandatory under Public Law and the Agency is committed to carry out such a program as rapidly as possible.

Manhours Required

8 manhours per week on a continuing basis.

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